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Why pitch consultants should be advisors  
and not marriage arrangers

By Darren Woolley · 15 October 2020 12:20pm



A professional pitch consultant is there to help you choose the right agency for you.

The role of the consultant is to help the advertiser work through a decision-making process, says Darren Woolley, the founder and global chief executive of TrinityP3. This means working through the pre-agreed framework defining a successful outcome.

With so much business going to pitch at the moment, it is disconcerting but not surprising that perhaps not all processes are being run properly. Not all pitches are run or managed by pitch consultants. Most pitches are handled either by marketers or with the help of their procurement team.

But you would hope, having gone to the trouble and expense of appointing an external consultant to manage the pitch, it would be well managed. But two examples of pitch consultant behaviour that landed this month are deeply concerning for several reasons.

First, it is clear that not all pitch consultants see their role as managing or facilitating a successful outcome for their client. But, second and more concerning, some marketers and procurement teams appear to want someone to decide on the agency selection for them.

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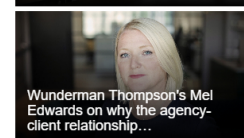
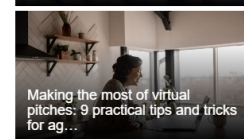
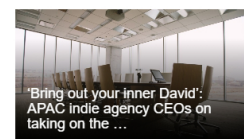
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The first example was from a pitch consultant I know, who shared something that had happened recently on a pitch. He said, "We were deep in the pitch process when the procurement lead for the client was handing out the scorecards following the agency presentations. Noticing I was not completing the scorecard, they asked me why? I told them it is not my job to complete the scorecard. To which they retorted, "What are we paying you for then?"

"I pointed out that ultimately, they were entering into this commercial commitment, like marriage and that my role was to advise and not to decide on their behalf. I was shocked when the client told me that the previous pitch consultant they had used always scored the agencies and provided his opinion on each one. I exclaimed that it was 'clear you wanted a marriage arranger and not a pitch consultant'. Possibly the last time I will work with that company".

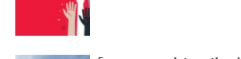
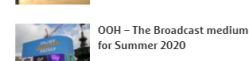
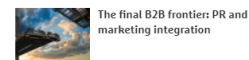
While many people dislike the scorecard, it is an effective way to collect and discuss opinions across the selection panel. The scorecard also provides an audited record of the decision-making process, in case the

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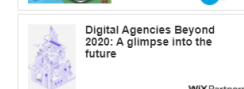


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decision is challenged.

But why would you want to have the pitch consultant score the agency? Hopefully, they have seen many agencies to be able to compare performance. But ultimately, the marketers are the ones who best understand the capabilities they need in an agency, and can best assess the chemistry and align on their creative expectations.

Yes, if the pitch consultant is only one of a dozen individuals scoring the agency this will have little impact on the final scores. But in scoring agency performance, the danger is the consultant could end up trying to justify their position, rather than facilitating the client decision-making process and, therefore, the best outcome.

This brings me to the second example from a creative director, who shared, "We had finished presenting our campaign to the client. The first voice in the room was the pitch consultant. The campaign was built around the idea of taking things slowly and enjoying contemplative moments.

But the pitch consultant told us that she didn't like it personally and that she didn't think it was exciting enough to appeal to families and young people. They weren't even the primary audience in the client's brief, but with such a strong opinion, she certainly steered the conversation. In fact, the only time the most senior client spoke was to say to us, "Thank you, but we're out of time."

Clearly, the consultant is trying to sink the agency prospects. But why? Did they not include the agency on the consideration list? And how is the consultants opinion on the creative concept any more important than the clients'? Especially, as an ex-copywriter and creative director, I know that judging creative work is not about personal preference. So a consultant offering an opinion, even when requested, is self-aggrandisement.


Instead, the role of the consultant should be to assist the advertiser work through a decision-making process. This means working through the pre-agreed framework defining a successful outcome. It could be the tender brief or the creative brief or the agreed scorecards. But it is not based on personal opinion.


As the pitch consultant shared earlier, "clear(ly) you wanted a marriage arranger and not a pitch consultant". If you want someone to make the decisions for you, then why even be involved? Just hire someone to tell you who to choose. But a professional pitch consultant is there to help you choose the right agency for you. Not the agency they want, but the agency you think is right. After all, it is a decision you will need to live with for the foreseeable future.

**Darren Woolley is founder and global chief executive of TrinityP3.**

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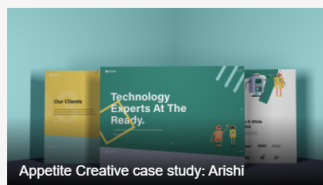
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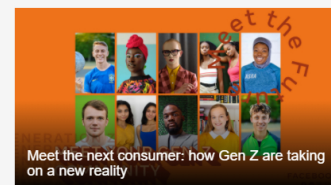
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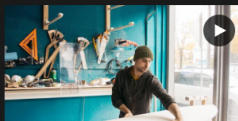
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